

Practice Gems: Administration of Estates 2021



Co-Chairs: **Jag Gandhi, TEP**, *Gluskin Sheff & Associates Inc.*

Susannah Roth, TEP, *O'Sullivan Estate Lawyers*

September 23, 2021

1:00 p.m. – 4:00 p.m.

Total CPD Hours = 2h 30 Substantive + 30 m Professionalism^P

Law Society of Ontario

SKU CLE21-00907

Agenda

1:00 p.m. – 1:05 p.m.

Welcome and Opening Remarks

Jag Gandhi, TEP, Gluskin Sheff & Associates Inc.

Susannah Roth, TEP, O'Sullivan Estate Lawyers

1:05 p.m. – 1:30 p.m.

Caselaw Update

Lisa Filgiano, Office of the Public Guardian and Trustee

Alex Procope, Perez Bryan Procope LLP

1:30 p.m. – 1:35 p.m.	Questions and Answers
1:35 p.m. – 1:50 p.m.	Limitation Periods and Advising Executors Daniel Paperny, <i>WEL Partners</i>
1:50 p.m. – 2:05 p.m.	Solicitors Acting as Executors – Duties, Compensation (10 minutes^P) Alexandra Manthorpe, <i>Cunningham, Swan, Carty, Little & Bonham LLP</i>
2:05 p.m. – 2:10 p.m.	Questions and Answers
2:10 p.m. – 2:30 p.m.	Solicitor’s Negligence and Defensive Practice (20 minutes^P) Andrea Hill, <i>Turkstra Mazza Associates</i> Jordan Oelbaum, <i>Schnurr Kirsh Oelbaum Tator LLP</i>
2:30 p.m. – 2:35 p.m.	Questions and Answers
2:35 p.m. – 2:50 p.m.	Coffee and Networking Break
2:50 p.m. – 3:05 p.m.	Section 116 Issues, Non-Resident Beneficiaries Sunita Doobay, <i>Blaney McMurtry LLP</i>
3:05p.m. – 3:20 p.m.	Digital Assets Sharon Hartung, <i>Your Digital Undertaker</i>
3:20 p.m. – 3:25 p.m.	Question and Answer Session

3:25p.m. – 3:40 p.m. Dying with Debt – Creditor Issues and Bankrupt Estates

Craig Ross, *Pallett Valo LLP*

3:40 p.m. – 3:55 p.m. Dealing with Jointly Held Assets

Stephanie Battista, *O’Sullivan Estate Lawyers*

3:55 p.m. – 4:00 p.m. Question and Answer Session

4:00 p.m. Program Ends